CLAIMS

What is claimed is:

1   1.   A method for importing data in a network-based customer relationship

2   application, comprising:

3   (a)   identifying data to be imported to a customer relationship application utilizing a

4   network;

5   (b)   identifying a set of predetermined rules associated with the customer

6   relationship application;

7   (c)   importing the data to the customer relationship application utilizing the network

8   in accordance with the set of predetermined rules; and

9   (d)   storing the data in memory accessible to the customer relationship application;

10   (e)   wherein fields in which the data is stored in the memory are customizable by a

11   user.

1   2.   The method as recited in claim 1, wherein an application for importing the data

2   is generated based on the rules.

1   3.   The method as recited in claim 2, wherein the application runs periodically at

2   user-defined intervals.

1   4.   The method as recited in claim 1, wherein the predetermined rules are specified

2   based on user interaction with an application creation program.

1   5.   The method as recited in claim 1, further comprising transforming the data.

1 6.   The method as recited in claim 5, wherein the data is transformed based on user-

2   created scripting functions.

1 7.   The method as recited in claim 1, further comprising exporting data from the

2   customer relationship application utilizing the network.

1 8.   The method as recited in claim 1, wherein the rules relate to at least one of

2   referential integrity, required fields, and automatic sequence numbering.

1 9.   A computer program product for importing data in a network-based customer

2   relationship application, comprising:

3 (a)   computer code for identifying data to be imported to a customer relationship

4   application utilizing a network;

5 (b)   computer code for identifying a set of predetermined rules associated with the

6   customer relationship application;

7 (c)   computer code for importing the data to the customer relationship application

8   utilizing the network in accordance with the set of predetermined rules; and

9 (d)   computer code for storing the data in memory accessible to the customer

10   relationship application;

11 (e) wherein fields in which the data is stored in the memory are customizable by a

12   user.

1 10. A system for importing data in a network-based customer relationship

2   application, comprising:

3 (a)   logic for identifying data to be imported to a customer relationship application

4   utilizing a network;

5 (b)   logic for identifying a set of predetermined rules associated with the customer

6   relationship application;

7 (c) logic for importing the data to the customer relationship application utilizing the

8   network in accordance with the set of predetermined rules; and

9 (d) logic for storing the data in memory accessible to the customer relationship

10   application;

11 (e) wherein fields in which the data is stored in the memory are customizable by a

12   user.

1 11. A method for exporting data in a network-based customer relationship

2   application, comprising:

3 (a) identifying data to be exported from a customer relationship application utilizing

4   a network, wherein the data is stored in memory accessible to the customer

5   relationship application;

6 (b) identifying a set of predetermined rules associated with the customer

7   relationship application;

8 (c) exporting the data from the customer relationship application utilizing the

9   network in accordance with the set of predetermined rules; and

10 (d) wherein fields in which the data is stored in the memory are customizable by a

11   user.

1 12. The method as recited in claim 11, wherein a service application for exporting

2   the data is generated based on the rules.

1 13. The method as recited in claim 12, wherein the service application runs

2   periodically at user-defined intervals.

1 14. The method as recited in claim 11, wherein the predetermined rules are specified

2   based on user interaction with a service application creation program.

1 15. The method as recited in claim 11, further comprising transforming the data.

1 16. The method as recited in claim 15, wherein the data is transformed based on
2   user-created scripting functions.

1 17. The method as recited in claim 11, further comprising importing data to the
2   customer relationship application utilizing the network.

1 18. The method as recited in claim 11, wherein the rules relate to at least one of
2   referential integrity, required fields, and automatic sequence numbering.

1 19. A computer program product for exporting data in a network-based customer
2   relationship application, comprising:
3 (a) computer code for identifying data to be exported from a customer relationship
4   application utilizing a network, wherein the data is stored in memory accessible
5   to the customer relationship application;
6 (b) computer code for identifying a set of predetermined rules associated with the
7   customer relationship application; and
8 (c) computer code for exporting the data from the customer relationship application
9   utilizing the network in accordance with the set of predetermined rules;
10 (d) wherein fields in which the data is stored in the memory are customizable by a
11   user.

1 20. A system for exporting data in a network-based customer relationship
2   application, comprising:
3 (a) logic for identifying data to be exported from a customer relationship application
4   utilizing a network, wherein the data is stored in memory accessible to the
5   customer relationship application;

6   (b)   logic for identifying a set of predetermined rules associated with the customer

7   relationship application; and

8   (c)   logic for exporting the data from the customer relationship application utilizing

9   the network in accordance with the set of predetermined rules;

10   (d)   wherein fields in which the data is stored in the memory are customizable by a

11   user.

1   21.   A method for generating an application for managing network data transfer

2   operations, comprising:

3   (a)   displaying a screen for receiving a designation of a type of application to be

4   created;

5   (b)   displaying a screen for receiving a designation of an origin of the data;

6   (c)   displaying a screen for receiving a designation of a destination for the data;

7   (d)   generating a mapping of fields between the origin of the data and the destination

8   of the data;

9   (e)   creating the application; and

10   (f)   displaying a screen for allowing user manipulation of the mapping;

11   (g)   wherein a data transfer operation is performed upon execution of the application.

1   22.   The method as recited in claim 21, further comprising specifying an interval of

2   time that elapses between automatic execution of the application.

1   23.   The method as recited in claim 21, wherein the type of application is at least one

2   of an SQL import application, an export application, an ODBC import

3   application, an ODBC export application, a file import application, a file export

4   application, an electronic mail import application, and an electronic mail export

5   application.

1   24.   The method as recited in claim 21, further comprising receiving a specification

2   of a name for the application.

1   25.   The method as recited in claim 21, further comprising receiving login

2   information.

1   26.   The method as recited in claim 21, further comprising gathering logging

2   information.

1   27.   The method as recited in claim 21, wherein the user manipulation of the

2   mapping includes altering the mapping of fields of the destination of the data to

3   the fields from the origin of the data.

1   28.   The method as recited in claim 27 wherein the altering includes specifying the

2   fields to be transferred from the origin of the data.

1   29.   The method as recited in claim 27, wherein the altering includes providing the

2   names of the fields from the origin of the data which correspond to selected

3   fields of the destination of the data.

1   30.   The method as recited in claim 27, wherein the altering includes providing the

2   names of the fields from the destination of the data which correspond to selected

3   fields of the origin of the data.

1   31.   The method as recited in claim 27 wherein the altering includes specifying the

2   fields to be transferred from the origin of the data.

1   32.   The method as recited in claim 21, wherein the mapping of the fields includes
2   custom fields added at a client site.

1   33.   The method as recited in claim 21, further comprising receiving scripting
2   functions.

1   34.   A computer program product for generating an application for managing
2   network data transfer operations, comprising:
3   (a)   computer code for displaying a screen for receiving a designation of a type of
4   application to be created;
5   (b)   computer code for displaying a screen for receiving a designation of an origin of
6   the data;
7   (c)   computer code for displaying a screen for receiving a designation of a
8   destination for the data;
9   (d)   computer code for generating a mapping of fields between the origin of the data
10   and the destination of the data;
11   (e)   computer code for creating the application; and
12   (f)   computer code for displaying a screen for allowing user manipulation of the
13   mapping;
14   (g)   wherein a data transfer operation is performed upon execution of the application.

1   35.   A system for generating an application for managing network data transfer
2   operations, comprising:
3   (a)   logic for displaying a screen for receiving a designation of a type of application
4   to be created;
5   (b)   logic for displaying a screen for receiving a designation of an origin of the data;
6   (c)   logic for displaying a screen for receiving a designation of a destination for the
7   data;

8   (d)   logic for generating a mapping of fields between the origin of the data and the

9   destination of the data;

10 (e)   logic for creating the application; and

11 (f)   logic for displaying a screen for allowing user manipulation of the mapping;

12 (g)   wherein a data transfer operation is performed upon execution of the application.

1   36.   A method for importing data in a network-based customer relationship

2   application, comprising:

3 (a)   identifying data to be imported to a customer relationship application utilizing a

4   network;

5 (b)   identifying a set of predetermined rules associated with the customer

6   relationship application;

7 (c)   transforming the data based on user-created scripting functions;

8 (d)   importing the data to the customer relationship application utilizing the network

9   in accordance with the set of predetermined rules; and

10 (e)   storing the data in memory accessible to the customer relationship application.

1   37.   A method for exporting data in a network-based customer relationship

2   application, comprising:

3 (a)   identifying data to be exported from a customer relationship application utilizing

4   a network, wherein the data is stored in memory accessible to the customer

5   relationship application;

6 (b)   identifying a set of predetermined rules associated with the customer

7   relationship application;

8 (c)   transforming the data based on user-created scripting functions; and

9 (d)   exporting the data from the customer relationship application utilizing the

10   network in accordance with the set of predetermined rules.

1   38.   A method for generating an application for managing network data transfer

2   operations, comprising:

3   (a)   receiving a designation of a type of application to be created;

4   (b)   receiving a designation of an origin of the data;

5   (c)   receiving a designation of a destination for the data;

6   (d)   generating a mapping of fields between the origin of the data and the destination

7   of the data;

8   (e)   creating the application; and

9   (f)   allowing user manipulation of the mapping;

10   (g)   wherein a data transfer operation is performed upon execution of the application.

1   39.   A method for generating an application for managing network data transfer

2   operations, comprising:

3   (a)   receiving a designation of a type of application to be created;

4   (b)   receiving a specification of a name for the application;

5   (c)   receiving a designation of an origin of the data;

6   (d)   receiving a designation of a destination for the data;

7   (e)   receiving a designation of an interval of time that elapses between automatic

8   execution of the application;

9   (f)   receiving login information;

10   (g)   gathering logging information;

11   (h)   receiving scripting functions;

12   (i)   generating a mapping of fields between the origin of the data and the destination

13   of the data, wherein the mapping of the fields includes custom fields added at a

14   client site;

15   (j)   creating the application, wherein the type of application is at least one of an SQL

16   import application, an export application, an ODBC import application, an

- 28 -

17   ODBC export application, a file import application, a file export application, an

18   electronic mail import application, and an electronic mail export application;

19   (k) allowing user manipulation of the mapping, wherein the user manipulation of the

20   mapping includes altering the mapping of fields of the destination of the data to

21   the fields from the origin of the data; and

22   (l) performing a data transfer operation upon execution of the application.

1 40. The method as recited in claim 39 wherein the altering includes specifying the

2   fields to be transferred from the origin of the data.

1 41. The method as recited in claim 39, wherein the altering includes providing the

2   names of the fields from the origin of the data which correspond to selected

3   fields of the destination of the data.

1 42. The method as recited in claim 39, wherein the altering includes providing the

2   names of the fields from the destination of the data which correspond to selected

3   fields of the origin of the data.

1 43. The method as recited in claim 39 wherein the altering includes specifying the

2   fields to be transferred from the origin of the data.

NAI1P030/01.153.01